DOCUMENT RESUME

ED 165 242 EA 011 155

AUTHOR	Levin, Benjy
TITLE	Improving Board Effectiveness: A Review of the Literature and a Proposal.
INSTITUTION	Social Planning Council of Winnipeg (Manitoba).
PUB DATE	9 Sep 77
NOTE	34p.
AVAILABLE FROM	Social Planning Council of Winnipeg, 501-177 Lombard, Winnepeg, Manitoba, Canada R3B 0W6 ($1.50; $1.00 for quantities of 10 or more)
EDRS PRICE	MF-$0.83 Plus Postage. HC Not Available from EDRS.
DESCRIPTORS	*Board of Education Role; Boards of Education; Foreign Countries; Governing Boards; *Inservice Education; Literature Reviews
IDENTIFIERS	Canada

ABSTRACT

This study is divided into two parts. The first part is an overview of the literature on boards. This includes consideration of boards of directors of business corporations, of school boards, and of social service boards. The review assesses this literature in terms of its relevance for improving social service boards. Also included is a detailed review of literature directly related to the improvement or training of boards of directors. Methods and materials are discussed. The second part of the report makes some suggestions about the kinds of programs that might be effective and gives some proposals for further action. Six models of board training are suggested--special seminars; retreats for a single board; institutes for board chairmen, executive directors, or board members; the provision of self-study materials and ideas; short-term consultation; and long-term consultation. (Author/IRT)

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IMPROVING BOARD EFFECTIVENESS: A REVIEW OF THE LITERATURE AND A PROPOSAL

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

Social Planning Council of Winnipeg
September 9, 1977

Principal Investigator:
Benjy Levin

EA 011 155

"Board members should be treated like mushrooms: keep them in the dark, feed them plenty of manure, and if a head pops up (to ask a question or make a suggestion), chop it off at once."

Quoted in C. Brown (1976), p.6.

The Author

Benjy Levin holds a Masters Degree in Education from Harvard University. He has served on several boards, including election to a school board at age 19. He is the author of several articles published in education journals.

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Introduction

This report was commissioned by the Social Planning Council of Winnipeg as a result of the Council's continuing concern about the functioning of boards of directors of many social service agencies. The Council felt that a first step in any effort to help boards should be the identification and review of pertinent literature and of relevant programs conducted elsewhere.

The study is divided into two parts. The first part is an overview of literature on boards. This includes consideration of boards of directors of business corportations, of school boards and of social service boards. The review assesses this literature in terms of its relevance for improving social service boards. Also included is a detailed review of literature directly related to the improvement or training of boards of directors. Methods and materials are discussed. The second part of the report makes some suggestions about the kinds of programs which might be effective, and gives some proposals for further action.

Only sources and materials directly related to boards of directors wer reviewed. Thus literature on related subjects such as leadership training or group dynamics is not discussed. There is no single location or reference for material on boards. Information is scattered in many sources and under

several subject readings. Sources consulted included the:

Social Science Citation Index, CIJE-ERIC system, Sociology Abstracts, Health Administration Abstracts, Business Abstracts, Dissertation Abstracts, several bibliographies and some miscellaneous sources. Over 50 individuals and agencies with an interest in the subject were also contacted. The author believes that the literature review is comprehensive, but not all existing programs have been reported.

The assistance of all those who responded to requests for information is appreciated. The contents are the sole responsibility of the author, and do not reflect the policy or opinion of the Social Planning Council of Winnipeg.

Part 1 - Literature Review

Business Corporation Boards

Boards of private companies are similar in function to social service boards, but the perspective revealed by the literature about them is very different. Commentators seem to be generally agreed that most corporate boards are little more than figureheads for the companies, and that real power is concentrated in the hands of company presidents. Mace (1971), for example, found that boards of companies do not establish objectives, strategies and broad policies, do not ask discerning questions of managements, and do not even select the president except in times of crisis. "Boards do not do more than they do because presidents do not want them to do more" (Mace, 1971, 86). Brown (1976) writes that without substantial changes, "...it is difficult to see how the board of the future can be organized to discharge fully the complex responsibilities required."(107) The fact that courts are placing more and more responsibilities on corporate boards - at least in the United States - is causing much concern, resulting in articles in business magazines such as "The Board of Directors: Its Problems and Prospects", and "Why Would Anyone Want to Be a Corporate Director?".

There is little to be learned about board effectiveness from the corporate literature, however. Many of the problems are very basic ones: boards with no

prepared agenda, meetings without any background material,or boards composed mainly of company officials. The concept of training directors is never mentioned, presumably because any good businessman is thought to be a capable board member. The material which does suggest improvements in board functioning is usually of the "focus on policy issues" variety. It sounds good, but no clues are given about how to do it.

There is one exception to this, however. Several works espouse the idea of full time board chairmen or paid directors or both. (Of course,paying directors is common practice among corporations.) Brown, for example, advocates a full time board chairman whose job it would be to ensure that the board discharged its role in the company (Brown, 1976).Juran and Louden (1966) argue for a full time board "agent" to provide necessary independent staff support to the board. This theme of paid board members is, with a few exceptions, absent from the literature on social service or other voluntary boards.

School Boards

Because school boards are elected, and therefore openly political bodies, much attention has been given to their composition, election, and behaviour. The political nature of school boards limits the comparisons which can be drawn between them and social service boards which are, at least overtly, nonpolitical. For purposes of this paper it is sufficient to note that

school boards are generally perceived in the literature as being ineffective (Ziegler, 1974; Wiles and Conly, 1974; Bendiner, 1974) as policy makers. The problems cited include the familiar complaints of inadequate information, preoccupation with details at the expense of policy issues, and domination by professionals.

Most of the prescriptions offered for this situation are political - better candidates, better information systems, better communication with the public. Although several commentators have called for efforts to train school board members (Foster, 1974; Coleman, 1974), the elected status of boards makes many trustees resistant to such an idea.

School boards have, however, accepted the idea of continuing education. Most trustee associations now do offer training programs of various kinds to board members. These range from simple get togethers to discuss common problems, to sophisticated role playing and simulation exercises. Content of school trustee training programs may range from how to set up an agenda to discussion of the difference between policy and administration. No material was found in this review which evaluated the effectiveness of any of these programs in terms of changes in actual behaviour. The social science literature on the effects of various kinds of group training processes suggests that pessimism should be the order of the

day. (See, for example, Psychological Bulletin, 1968).

Social Service Agency Boards

1. Guidebooks

Four books were located which have been written as general guides to boards of directors of social service agencies. Two of these are by Trecker. Building the Board was published in 1954, and is chiefly concerned with the process of creating a strong board. It includes chapters on board composition, on the location of suitable candidates, on tenure in office, and on the work of the nominating committee. The sections on orienting and training of boards will be discussed below. Trecker's more recent work, Citizen Boards at Work (Trecker,1970) is useful in that it reviews related literature and research for each of the areas discussed. (For example, there is a section on various definitions of policy and policy-making.)

Also in this category are two works published by the National Information Centre on Volunteerism. Hanson and Marmaduke (1972) have compiled something halfway between work such as Trecker's and the kind of short handbooks that are discussed below. Their book is designed as a sort of do-it-yourself checklist for board members. Conrad and Glenn (1976) use a hypothetical organization to illustrate various aspects of the work of a board. Both these publications are intended for direct use by board members.

There are also many manuals or handbooks written

for the orientation of board members. Hartog's (1974) bibliography lists sixteen such publications. Locally the Manitoba Health Organization has compiled a handbook for boards of health organizations. Also used is the 1968 publication of the National Information Bureau, The Volunteer Board Member in Philanthropy.

All these works are limited. Board membership involves a complex set of relationships and requires complex abilities. The guidebooks and manuals cited here are too general in their discussion to be of very much practical use beyond giving very basic information. A further difficulty is that they are prescriptive, in that they advocate a correct code of practices, but do not help people move towards more effective operation. Thus their effect is quite limited.

2. Studies of particular aspects of the functioning of boards

This section examines a number of studies which have looked at aspects of the operation of voluntary boards of social service agencies. Studies reviewed were only those which had some relation to the effectiveness of board operations. Thus studies on, for example, conflicts between boards and executive directors were not considered.

Surveys

A number of authors have surveyed boards of various kinds to gather data about composition and

operations. Pfeffer (1973) studied 57 hospital boards in the U.S. He found that the size and composition of boards depended on their chief function. Pfeffer payed particular attention to boards which had major responsibilities in fund-raising. Hanson (1971) surveyed 100 board members of Colorado mental health clinics.He found significant correlations between board members understanding of roles and their activity and participation, but not among meeting attendance, type of clinic, or profession of clinic director and role understanding. Polivka (1969) studied the role perception of 50 board presidents in Washington, D. C. In a study of hospitals in the U.S., Wentz (1963) found high levels of dissatisfaction among board members with the performance of their hospitals. Schaub (1975) surveyed and background of 142 board members of child care organizations. Papenfuss (1972) suggested that boards alter their composition in order to adapt tc new issues facing the organization. Carpenter (1972) studied the obligations, involvment and effectiveness of 310 hospital board members in Michigan and Mississippi.

Perhaps the most thorough survey is Hartog's (1974) study of Board members, presidents and directors of social service agencies in New York. Over 1500 board members from 300 agencies were included. Hartogs reports on composition of boards, the background of

board members, the reasons for accepting board membership, the kind of orientation received, the organization of board meetings, the key functions of the board, the preceptions of board members regarding their work and major problems seen by board members. These studies, for all the work involved, yield few substantial results. There are problems, clearly, but solutions are rarely mentioned. There is interesting information, but few specific suggestions for improvement.

Analyses of Board Operations

Wiehe (1975) surveyed fifty social service agencies in his study on role expectations of board members and staff. Replies indicated that there was uncertainty among board members about their own role in the agency. Robins and Blackburn (1974) found that the boards of community mental health centres had a low orientation towards community health ideology. The 23 board members interviewed thought that their power to influence the centres on whose boards they sat was limited. Weissman (1973), in a book not directly about boards, comments on their general lack of responsiveness. Loewenberg (1965) studied the participation of boards of 12 agencies in decision-making within the agencies. He used involvement in at least two stages of the decision-making process as his criterion for participation, so that mere formal approval by the board was not sufficient to qualify. Board participation was found to be related negatively to agency size and complexity, and unrelated to organizational goals, number of professional staff, or agency reputation.

Dreyer (1975) was critical of hospital boards as a result of his study of 92 hospitals in New England. Taylor (1974) also surveyed hospital trustees. Board members showed most knowledge in the areas of planning, management standards, finance, public relations and fund raising, and least in the area of medical programs.

Despite all these studies, we know little about how boards operate on a month to month basis. Case studies, which would be useful for this purpose, are practically nonexistent. Kovner (1975), in reviewing research on boards, points out that most of the literature relies on responses to surveys, and calls for more study of what boards actually do. Zald (1969), in developing a theory of the power and functions of boards, also notes that there is "a scarcity of meaningful data" (p.110). As long as there is no reliable evidence on what boards do, there is little chance of effecting very much change in their behaviour.

3. Prescriptive Studies

The absence of substantial data on the actual behaviour of boards has not however, inhibited suggestions about ways of increasing their effectiveness. De Lelys (1969) reviews concepts of good board operation, but makes few comments about what boards actually do. Her paper is chiefly a repetition of the conventional wisdom. Makowski (1976) outlined a model for hospital governance under three terms: mandate, maintain and monitor. He discusses the subsets of each of these in general terms. Carpenter (1972), after noting a lack of agreement by hospital board members on their role, outlined a "prescriptive

model" for hospital boards. Weissman (1973) suggests that giving a board independent access to information about the agency is the most important action needed to improve board effectiveness. He also suggests that some tension between board and staff is healthy in pushing each to its full capacity.

Robins (1976) outlines a model for board decision-making which involves the board in the development of "process objectives", such as responsiveness, accessability, and integration of services. Robins agrees that boards may need their own staff to avoid reliance on the biases of professionals in the organization. Zimmerman (1976) makes a number of suggestions for promoting renewal in voluntary organizations, such as rotation of board members, the use of educational experiences such as retreats, travel, and exchange programs, and the operation of self-evaluation programs among agencies. Wiehe (1976) lays out a plan for providing information to boards through the proper use of committees, reports, and agenda materials.

While providing interesting ideas, none of these studies provide very much help of the how-to-do-it sort. The best critique of the function of boards is an essay by Robert Greenleaf entitled "The Trustee as Servant" (1974). Greenleaf argues for a fundamental reorientation of boards of voluntary organizations, based on the original meaning of the word "trustee", as one who builds trust. He outlines six key functions

of a board, discusses the role of staff with full recognition of the potential for boards to be dominated by staff, and details the role of information in the operation of the board. The heart of Greenleaf's argument rests on his support for full or part time board chairmen paid by the organization to organize the work of the board. He also supports the notion of a "coach" for boards to provide conceptual leadership; that is, to help the board figure out what it is doing and how best to do it. Greenleaf's study is the most specific of those cited here in its suggestions for change.

4. Board evaluation studies

Several writers have suggested approaches for boards to use in evaluating current standards of performance. Witt (1976) discusses the "self-audit" concept for boards, including the formation of job descriptions for board members and the setting of standards of performance for the board as a whole. Meyers, Grisell et al (1972) developed a short index of board accomplishment along several major dimensions which they postulate for boards involved with mental health and retardation. These dimensions include activity in developing and improving services, creating public awareness, fund raising, program evaluation, planning, and contact with other agencies. A number of manuals for board members include checklists for rating accomplishment. One of the better of such lists is in

Trecker (1970), and contains thirty-six items by which to judge board effectiveness.

Training and Orientation

There is general agreement in the literature that orientation and training of board members is a crucial function which is presently not well done. Seiler (1967) found that only 3 percent of hospital boards had a formal orientation program, and that almost two-thirds had no continuing education for board members. Of those hospitals which did provide continuing education opportunities, almost none had a definite program for such education. Seiler concluded that substantial improvement was necessary in the areas of orientation and continuing education. Wiehe (1975) found that board training sessions ignored such issues as the roles of board and staff, and consisted generally of an introduction to the history and operation of the agency. Trecker (1970) regarded the orientation of boards as "poorly handled", and attached the neglect of continuing education for board members. A seminar in Tennessee in 1976 described the training of hospital trustees as "chaotic" (Porter, 1977). Training of board members was first on the list of unmet needs identified by board chairmen and agency directors in Hartog's (1974) survey. Only a fifth of the agencies in the study had as much as a single special orientation meeting for new board members. Greer, in reviewing literature on training health boards, spells out

the dangers of setting lofty aims for citizen participation without "attention to understanding and fostering circumstances under which citizen participation is effective." (Greer, 1976, p.57).

1. Approaches to training

While there seems to be agreement about the need for further education, or training, for board members, the literature is less revealing in its discussion of specific ideas for such training. Most of the proposals are in general terms only. Trecker (1954) devotes a chapter to training in which he outlines the content of training programs (the agency, the community, and the operation of the board), and cites several principles of training:

- formulate the purposes clearly
- have board members participate in planning
- allow the expression of individual ideas and needs as a basic element
- plan carefully
- sequence tasks in order of complexity
- control pace and timing of events
- ensure continuity of content
- ensure follow up
- evaluate all training programs

Trecker also suggests that any written material used should be concise, specific to points being raised, and attractively designed. Trecker's later book (1970) concentrates on principles of evaluation of board performance; they are, not surprisingly, very similar

to those cited above. Porter (1977) reports the need for three levels of board education - information, skill training, and the development of appropriate behaviour. She makes no specific suggestions, however.

Greer (1976) has looked carefully at the area of board training and developed a model for such efforts although it is specifically aimed at consumer participation in health agencies. She lists the objectives of board training programs as trust building, developing processes of accomodation in decision-making, and overcoming alienation and hostility. She recognizes that training involves costs in time and money, but points out that the high demand by board members suggests that training should not therefore be neglected. The four greatest problems in consumer participation on boards are poor attendance, inefficient use of board time, relations between board members and their constituents, and the staff role. Greer discusses the need for board members to have independent staff, or at least for the development of staff skills which support participation of board members instead of impeding it.

In regard to training strategies Greer has several suggestions. The focus of training should be on tasks of immediate and real interest rather than on abstract principles of operation. The purposes of training programs must be specified. An "at ease" atmosphere, created by a comfortable setting and the use of small

groups, is helpful. A common vocabulary and the avoidance of jargon are recommended. Training is continuous; one does not "graduate" from it. Above all, Greer notes the importance of realism in expectations; "results will not be quick, dramatic or easy." (p. 60).

It is also worthwhile to note some cautions about training of board members. Wiehe (1975) found that board members who had received some orientation were no clearer about board and staff roles than board members who were not oriented. (In fairness, Wiehe also found that the content of orientations seldom dealt with the issue of the role of the board). Weissman is also sceptical about training. "Board training is an old idea in social agencies that has never worked well." (1973, p. 70) Much of the social science literature on various kinds of training programs indicates that change in behaviour are very difficult to produce, and that short, one-time programs have few lasting effects.

2. Specific Programs

Just where one would want a large number of descriptions of specific programs, including evaluations of their effectiveness, there is little written at all.

Briscoe, Hoffman and Vailey (1975) reported a project to train low-income members of a community agency board to problem-solve. They began by asking students to work with the individual board members, but found

that this had little effect on the board's operation. Using videotapes the authors then taught board members to focus on stating the problem, on identifying possible solutions, and on attempting to get agreement on a course of action. When conducted with the whole board this training proved relatively ineffective, but when done with individuals before board meetings produced noticeable improvement in the skills. While interesting, such a program is a very long way from helping board members cope with the complexity of modern social service agencies.

There are, it is apparent, many individual efforts at training board members through such devices as agency or community seminars and orientation. There are also several recent large scale efforts to train trustees, especially in health care.

The American Hospital Association is attempting to provide some help to trustees through inserts in its monthly magazine, Trustee. Each issue contains a section intended to cover a specific aspect of board operations. The segments are based on programmed instruction models, with specified learning objectives. The program has not yet been evaluated.

The University of Minnesota has developed an independent study program for health care trustees, "Roles and Processes of Trusteeship", funded by the Kellogg Foundation. Basically, however, this amounts to a kind of textbook on the subject, Albeit a well written one.

The British Columbia Health Association has

developed a trustee education program called GAMAT, involving the provision of resource people to work with boards on a variety of issues and tasks. Each program is designed specifically for a particular board and its problems. Resource people are trained by the program to work with boards, much like Greenleaf's proposed coaches.

The U.S. National Health Planning Information Centre has information about a variety of board education programs of various types being conducted. As with the other programs mentioned here, however, there is no evaluation of effectiveness available, and in some cases no objectives have been specified, making any evaluation problematic.

Taken as a whole, these efforts suggest great concern for better boards, and willingness to commit funds to projects. Judgments about the results of these efforts cannot yet be made.

Conclusion

Better boards are a motherhood issue. Everyone is in favour. There is also agreement that many improvements could readily be made in the effectiveness of most boards. Most of the sage advice ends there, however. The literature provides some ideas about, but few examples of ways of helping boards. Several interesting programs are in operation, but first hand observation would likely be required to assess their use.

A Modest Proposal

Many possibilities for board training or education programs exist. Among them are the following "models".

1. Special seminars, from an evening to a week in length, either general or focussed on a specific topic.
2. Retreats for a single board to reassess its operation.
3. "Institutes" for board chairmen or executive directors or board members. These could be a series of meetings to discuss one or several concerns, involving small or large groups.
4. The provision of self-study materials and ideas for board members to use and implement on their own.
5. Short term consulting, involving the provision of skilled assistance to help a board with a particular problem.
6. Long term consulting, or coaching, involving an outsider working with a board over several months to help identify and correct difficulties. Such an approach would likely be based on principles of organizational development.

The argument of this paper is that any worthwhile board training effort must focus on changes in the behaviour of boards and board members. Training or education which does not produce such changes in the actual working of a board or boards is ineffective and, in fact, counterproductive.

Since the literature reviewed in the first part of this document does not provide a sound basis for a specific proposal for improving the boards of social service agencies, this section must rest largely on theoretical grounds. It would be

presumptuous, however to ignore all that has been said and written on the subject. Thus it is appropriate to begin by stating several principles that should underlie any effort to work with boards.

1. Modesty. Any program should be small in scale with any growth depending on the demand from users.
2. Responsiveness. A program of board education should be able to work with boards on their problems as they define them.
3. Flexibility. A variety of options and techniques should be used. Packaged material must be used only with care.
4. Continuity. Programs should extend over time in some sort of sequence or progression. Single efforts are unsatisfactory.
5. Reality. Whenever possible programs should involve the analysis of real, day to day problems facing boards.
6. Specificity. Programs should be well planned and have specific goals. Time should be carefully structured.
7. Participation. Input from board members should be sought in the planning of any program.
8. Activity. Programs should be activity-based as much as possible. Lectures and other forms of didacticism should be avoided.
9. Follow-up. The real test of any training is in its effect on behaviour. Careful follow-up is important to ensure that ideas and intentions are put into practice.

Accordingly, the first step must be to assess the degree of support form boards for better educational or training opportunities. Before any program is developed it is necessary to have a

genuine indication from many board members that they see a need for better board education programs FOR THEMSELVES, and that they are prepared to participate in such programs. It is easy to get agreement that training is needed - for somebody else - but this agreement does not lead to any commitment. If boards are to be expected to participate in training programs their public support should be sought before any programs are begun.

How might this work in practice? A beginning might be a meeting of concerned board members to discuss the need for training or educational opportunities. It is important to ensure reasonable attendance at such a meeting (perhaps through such means as personal contacts). It is also important that board members see such a meeting as their forum to express needs, not as a funder's way of coercing action. The agenda for such a meeting should be carefully planned and very limited. Speeches should be avoided; rather the aim should be to promote honest discussion of problems in board functioning in an atmosphere that accepts such problems and is focussed on ways of helping. Ideally such a meeting could end with some sort of declaration - if this was the feeling of those attending - that greater support for boards was necessary, and with a decision to take some further step in that direction (that is, the creation of some mechanism such as an elected steering committee, to follow up).

In keeping with the principles cited earlier, what should be developed is not a product but a process. The preparation of specific seminars or packages of material for board members is not the best

way to begin. A way of making a variety of resources available to boards to meet a variety of expressed needs makes more sense.

One way of providing these resources is to try to find funds to hire a board development coordinator. The job of this person would be to match the needs of boards with available expertise. The coordinator would be responsible chiefly for developing a netowrk of people and ideas which could be helpful to boards and board members, and for making these resources known and attrative to potential users. The coordinator might do some of the direct work with boards, but need not do so.

A board, knowing that help of various kinds was available, would then ask for some sort of assistance. This could range from aid in drawing up a financial statement for the use of the board to a long range, organizational development consultation,to help in clarifying expectations and roles when a new executive director is being hired. The coordinator would find people who could help the board, and put them in contact. Actual work would depend on an agreement between the resource person and the board.

The advantages of this plan are several. It is flexible becuase it makes a variety of resources available. It is responsive because its use depends on requests from boards. It is specific because each program must be matched to a specific board and a specific need. It avoids the creation of new jobs which then set out to justify their existence. There is no large built-in investment. As needs change, changing resources can be made available.

Should it be felt that this approach is too indirect, that not all action should depend on the decision of various boards, it is quite possible for the coordinator to initiate some programs. Some functions, which would by their nature be of interest to many boards, could best be organized on this central basis. However, it should be remembered that the goal of lasting changes in board practices will only be achieved if board memebers develop real commitment to change. Thus the recommendation of the author is that most training activities ought to depend on boards' declaring an interest in receiving help of some sort. Trecker's 1954 book, Building the Board, begins with the assertion that:

> ...there is mounting evidence that social agencies are taking a total look at their boards. Even more heartening is the fact that boards themselves... are seeking ways of improving their own effectiveness. (Trecker, 1954,p.8)

Twenty years later the optimism seems to have been misplaced. If we are not to look back on today with the same feeling of disappointed hope, great care will have to be taken to make board training effective.

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